Magic Quadrant pour les plateformes de gestion des actifs numériques

6 janvier 2025 - ID G00808653 - 60 min de lecture

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Les plateformes de gestion des ressources numériques permettent aux organisations de gérer la création, la distribution et l'organisation des ressources numériques. Les responsables du marketing numérique peuvent utiliser cette étude pour comprendre la dynamique du marché des DAM et évaluer la capacité des fournisseurs à répondre aux exigences de leur organisation.

Définition/Description du marché

La gestion des ressources numériques (DAM) est un référentiel de contenu en libre-service. Elle facilite la gestion, l'ingestion, le stockage, l'organisation et la distribution de tous les types de contenu utilisés par une organisation. Le contenu comprend tout actif numérique, tel que du texte, des graphiques, des images, des vidéos, de l'audio, des fichiers de conception et des informations sur les produits utilisés par une organisation pour communiquer avec des publics internes et externes. Les plateformes DAM servent tous les secteurs de l'organisation, y compris le marketing, les ventes, les ressources humaines, la technologie, la fabrication, le droit, les finances, les centres d'appels et de services, les fournisseurs tiers, les agences et les distributeurs.

Au-delà de leur rôle de solution en libre-service, les produits DAM font partie d'un écosystème d'opérations de contenu, qui comprend des fonctionnalités qui se chevauchent entre des technologies telles que les plateformes de marketing de contenu (CMP), la gestion du travail marketing (MWM) et la gestion des informations sur les produits (PIM) . Individuellement, les technologies prennent en charge différentes variantes de taxonomie de contenu, d'édition de contenu, de gestion du contenu généré par les utilisateurs et de contrôles d'accès au contenu pour des tiers (par exemple, des agences). Leurs objectifs sont d'améliorer l'efficacité, la transparence et l'échelle des livrables de contenu dans l'ensemble de l'organisation. L'objectif principal d'un DAM est de rendre les actifs numériques disponibles et utiles, et de garantir que les actifs sont cohérents avec la marque de l'entreprise.

Les plateformes DAM servent de référentiel pour tous les actifs de contenu numérique. Les organisations qui disposent d'un grand nombre d'actifs numériques utilisent une solution DAM pour gérer, cataloguer et transférer des fichiers, et stocker physiquement les actifs numériques. Elle permet aux organisations de partager et de modifier des actifs numériques sur plusieurs

plateformes et canaux. Les plateformes DAM peuvent prendre en charge les partenaires externes en leur donnant accès à leur propre portail unique pour accéder aux actifs d'une organisation. Dans l'ensemble, il s'agit d'un référentiel de contenu en libre-service qui peut faciliter la collaboration.

The primary owners of a DAM are often referred to as admins, which are most likely found in marketing, but in some instances IT is the owner. DAM platforms are used to organize and filter user access to assets based on tags. DAM end-users (including, but not limited to, admins, creative teams, or marketing leaders) use a DAM to quickly upload assets in bulk for storage. Admins may also govern how, which portion of a template and where asset contents can be used. Increasingly, DAM's ability to support content accessibility and machine vision or natural-language processing capabilities exposes an organization's content to a wider range of groups.

Mandatory Features

Providers must-have the following capabilities to be considered a DAM solution by Gartner:

- **Organization and storage:** DAM platforms must have a searchable repository and library that allows users to easily locate and retrieve applicable assets. It should support metadata tagging and taxonomy management, often with AI-based automated content tagging.

- **Ingestion and creation:** DAM platforms must be configurable to brand portals to support the asset ingestion from and distribution to authorized users — both internal and external parties such as field sales teams, advertising and media agencies, or franchisees. Users must be able to oversee the creation and editing of assets. This includes support for tagging in-progress creative assets and allows creative professionals and relevant marketing associates with access to the asset repository within creative tools (e.g., Adobe Creative Cloud, AutoCAD and Microsoft 365).

- **Distribution and integration:** Provide support for digital rights and life cycle management of digital assets both internally and externally (e.g., external brand portals). DAM platforms must have governance controls such as access and identity management to provide content access controls and tracking. Providers must have a range of prebuilt connectors, APIs and other integration mechanisms to plug the DAM into the broader marketing and business technology ecosystem.

Common Features

The following common capabilities for the DAM market include:

- **Planning and governance:** This supports content approval workflows for content development (e.g., planning, task management, approvals and workflow). DAM platforms support defined workflows requiring approved users across any department to review, approve and promote work-in-progress projects through self-managed access controls.

- **Development and approval:** This supports editing assets (e.g., resizing an image or creating a clip of a video) and manipulating content with accompanying audit trails for changes, reviews

and approvals — including regulatory. DAM platforms should have tools in place to support the storying of sets of content.

- **Performance and reporting:** Providers should be able to deliver digital asset usage and distribution data (e.g., individual asset usage and internal search metrics) to analytics platforms.

- **Transformation services**: This provides multiple resolutions of images without the need to store each format (e.g., high resolution, low resolution, thumbnail).

- **Asset authorization and management**: Admins should have the ability to flag duplicate, unauthorized or unlicensed content based on tags — including metadata — and licensing and informing authorized users. Digital asset controls can support varying limitations of use and access across geographies. They should be able to set licensing dates and/or period terms for licensed content.

- **Global and multilingual deployment/support:** This involves midsize to enterprise-size companies that must support the governance and life cycle management of content assets across the entire organization dispersed across multiple business units, regions, languages and use cases.

- **Integration with core business technologies**: DAM platforms may be able to integrate with components of the broader business technology ecosystem (e.g., CRM, PIM, ERP and product life cycle management). This also includes enterprise identity and access management engines to enable single sign-on and enforce security policies. Providers should have connectors into internal systems such as desktop applications (e.g., Microsoft 365).

- **Automated and real-time multichannel content distribution:** The DAM solution allows content to be pushed into or requested by the engagement layer either as it is updated by the DAM or presented by the engagement layer. Many DAM platforms will deploy a content management system (CMS) or content delivery network (CDN) technologies to fulfill this role, but it requires the DAM solution to be capable of initiating or responding to a request.

- **Streaming Server:** DAM platforms may provide the ability to progressively download large formats of audio or video, and provide the ability for a user to preview the file while the remainder continues to download the remaining asset for review.

- **Workflow Automation:** DAM platforms may support the ability to automate metadata tagging, content creation, workflows and brand governance using generative AI for advanced assistance.

Magic Quadrant

Figure 1: Magic Quadrant for Digital Asset Management Platforms

Magic Quadrant

- CHALLENGERS
- LEADERS
- NICHE PLAYERS
- VISIONARIES

Challengers quadrant:
- Orange Logic
- Smartsheet
- Hyland
- Acquia
- Adobe

Leaders quadrant:
- Aprimo
- Bynder
- Storyteq

Niche Players quadrant:
- Canto
- Fotoware
- CELUM
- MediaValet

Visionaries quadrant:
- OpenText
- Sitecore
- Cloudinary

ABILITY TO EXECUTE

COMPLETENESS OF VISION →

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Vendor Strengths and Cautions

Acquia

Acquia is a Challenger in this Magic Quadrant. Its Aquia DAM product (formerly Widen) is focused on helping marketers organize, access and deliver digital assets across multiple channels, including e-commerce, email and websites. Its operations are mostly in North America, with a few customers in EMEA and APAC. Clients are predominantly multibrand midmarket or enterprise organizations in industries such as manufacturing and consumer packaged goods, government, healthcare and financial services. In 2024, Acquia acquired Monsido to enhance website accessibility. It also added Business Associate Agreements to support the U.S. HIPAA for patient data protection, which applies to all forms of online communications using assets. Acquia has

plans to introduce a DAM AI assistant, enabling natural language to identify assets as well as summarize, analyze and recommend assets for campaigns.

Strengths

- **Price reduction**: Acquia decreased its annual subscription cost of add-ons. Prospective buyers typically evaluate alternatives in the market, comparing price and functionality to obtain a more favorable deal. Acquia's stance makes it more competitive with market pricing and will likely increase adoption.

- **Sales strategy**: Acquia has a comprehensive customer acquisition team, including DAM-specific specialists to lead its sales. This depth of coverage makes its sales strategy for its DAM product and integrated solution effective. Prospective buyers hear directly from sales teams that have a deeper knowledge of the Acquia DAM offering.

- **Product portfolio and depth**: Acquia has a full ecosystem of marketing products outside its DAM (e.g., MMH, CDP, personalization engine). Its DAM allows users to create development workflows, such as database updates, and automate deployment out of the box with no coding required, and its DAM comes with an integrated PIM. It also offers unlimited, highly configurable user roles and permissions for governance.

Cautions

- **Creative development**: Aquia does not have its own GenAI capability to generate new assets (e.g., images and video); that capability is powered by Moovly, with whom Acquia has an OEM relationship for its add-on Acquia Video Creator solution. The generation of copy and descriptive "alt tags" is provided through third-party integration with Clarifai and OpenAI.

- **R&D investment**: Acquia's R&D investment raises questions about its future competitiveness in the DAM market, though the company has recently stated it is significantly increasing the resources allocated to product innovation, particularly related to AI. Customers and prospects should scrutinize whether Acquia's resources for new feature development will be sufficient for complex DAM use cases.

- **Multilingual support**: Although Acquia has offices in five global locations and customers in 80 countries, the geographic spread of new customers is predominantly in North America, with some in EMEA. Development and support may be biased to customers in these regions, as evidenced by the lack of native user interface and documentation support in languages other than English.

Adobe

Adobe is a Challenger in this Magic Quadrant. Its Adobe Experience Manager (AEM) Assets focuses on asset control, utilization and collaboration. It can be deployed on-premises or as a cloud solution with or without Adobe-managed services. Adobe is headquartered in the U.S. and has a global presence. Its clients for AEM Assets tend to be B2B and B2C large enterprises. Adobe's vision for AEM Assets positions it in the center of the content ecosystem, not as a passive storage component but as an activation hub for content. Recent updates include Content

Hub, an updated distribution portal that integrates with Adobe Express, which enables Firefly GenAI for asset generation and modification from within AEM Assets.

Strengths

- **Partner ecosystem:** Among vendors in this Magic Quadrant, Adobe has the most extensive partner ecosystem — over 4,700 globally — including agencies, service providers and systems integrators. This network provides customers with a wide range of partners to help with DAM implementation, configuration and administration.

- **Enterprise marketing approach:** AEM Assets fits into a comprehensive portfolio of products to solve use cases across the entire marketing life cycle. Collectively, its product portfolio can solve complex use cases that go beyond DAM, such as creative and work management and marketing execution that enterprise marketers must work within.

- **Creative enhancements:** Adobe is consistently at the forefront of meeting customer needs with innovations to power the content supply chain. Dynamic renditions scale content automation by changing a single asset, up to millions of variations. AEM Assets' latest addition includes Adobe Express, powered by Firefly, enabling marketers to use GenAI content within the DAM.

Cautions

- **Cost of GenAI:** The GenAI creative features of AEM Assets are provided through Adobe Express with Adobe Firefly. At the time of this evaluation, customers receive a number of creative credits with AEM Assets. Adobe plans to update its pricing in 2H24, including updates to its packaging and add-in consumption-based pricing for its GenAI modules.

- **Pace of innovation:** Its DAM's innovation has lagged compared to other vendors. It has focused on integrating AEM Assets into Adobe Express and recently created a Content Hub to enable asset reuse and modification. Innovation is primarily occurring within adjacent products that integrate with AEM Assets, such as Adobe Firefly or creating new product offerings, GenStudio, instead of focusing on enhancing AEM Assets itself.

- **Sales strategy:** To achieve full functionality of the content and meet expected outcomes, supply chain customers will most likely need to purchase adjacent tools. Buyers will need to deploy additional partners/services to manage the additional technology. Prospective buyers must understand which capabilities are included in their bundled solutions and when they might need additional tools and the required skill sets.

Aprimo

Aprimo is a Leader in this Magic Quadrant. Its Aprimo DAM product focuses on the entire life cycle of content operations (e.g., the plan, creation, management and distribution stages). Its operations are primarily in North America and EMEA, and its clients tend to be a mix of B2B, B2C and B2B2C large enterprises in the consumer packaged goods, financial services, healthcare and life sciences, and retail industries. Aprimo has enhanced its DAM platform by adding natural language search capabilities to identify assets without exact keywords. It has also added large language models to support the use of AI for automated content reviews, and its GenAI tools

support image creation and modification. Aprimo's roadmap includes an agency management module for brands with multiple agencies. It aims to streamline management, content submission, review and rework by using an AI-based scoring system.

Strengths

- **Integration network:** Aprimo has native bidirectional content modification support across marketing technologies (e.g., CDPs, digital commerce, MMHs, personalization engines) and enterprisewide solutions (e.g., collaboration tools, CRMs, digital workplace applications and PIMs). This support allows enterprises to effectively manage their content across all systems and ensure continuity.

- **Innovation:** Aprimo is a thought leader in the DAM platform market and one of the few vendors evaluated that excel in search, smart tagging and templating capabilities. It leverages both AI and GenAI to enhance the automation of asset management and workflows, supporting the entire content operations life cycle.

- **Vertical industry support:** Aprimo offers tailored, industry-specific "starter packs" that allow enterprises to use prebuilt workflow and taxonomy configurations. It serves regulated industries, such as governments, financial services and healthcare, by being FedRamp- and WORM-compliant in the U.S. and supporting Business Associate Agreements to comply with the U.S. HIPAA.

Cautions

- **GenAI costs:** Although Aprimo included numerous GenAI capabilities in the core product, the most impressive AI features — custom training for smart tags, AI content detection, smart transformation, image generation, translation, creative brief generation, brand and compliance reviews, predictive metadata — come at additional cost. The AI Elite add-on can increase the cost of ownership by up to a third.

- **Market focus:** Aprimo is becoming an all-encompassing platform with native workflow capabilities and the ability to support core DAM capabilities — the ingestion, management and distribution of digital assets. The hype and interest in enhancing GenAI capabilities overshadows investments in the core capabilities that end users seek, such as improving their front-end users' ability to find and utilize assets.

- **Marketing execution:** While Aprimo has a customer council, compared to other vendors of similar size, it has fewer in-person customer events. Such events add value by giving customers an opportunity to connect with peers, meet with solutions engineers and hear directly from the vendor about new features.

Bynder

Bynder is a Leader in this Magic Quadrant. Its DAM product focuses on AI-powered enterprise content management, experiences and distribution. Its operations are mostly focused in North America, EMEA and APAC. Its clients tend to be in the consumer packaged goods, healthcare, financial and technology industries. Most of its GenAI capabilities were developed within the last

year, but Bynder continues to invest in it and automation, such as metadata generation and content adaptation. Bynder plans to create persona-based experiences in its platform to accelerate adoption of the DAM, and add a natural language search capability.

Strengths

- **Product capabilities:** Bynder supports the primary functions of a DAM — asset storage, tagging, distribution and governance controls. It has a "waiting room" for newly ingested assets that are quarantined in a separate environment until an admin approves or denies the submission. It launched AI face detection, which identifies faces in an uploaded asset and will automatically add tags so it can be easily found.

- **Asset usage analytics:** Bynder's included asset dashboards allow users to filter asset usage results using metaproperty filters based on the customer's given taxonomy structure (e.g., campaigns, channel). Users can easily find the usage of a particular set of assets with the option to further analyze a specific asset for granular details, such as which specific users viewed or downloaded the asset.

- **Customer-centric:** Bynder invests in customer-centric marketing activities such as customer events, which they have consistently held over the years, that allow customers to connect with peers and hear and see product enhancements in person. Additionally, all Bynder clients have access to its product roadmap, and it hosts webinars to review product updates.

Cautions

- **Vertical strategy:** While Bynder's platform can support multiple industries, it does not have any vertical-specific roadmap or product enhancements tailored to a specific vertical. It develops its DAM from a horizontal perspective and adapts its offerings based on use cases. Increasingly, prospective buyers not only seek vendors who have a track record of supporting enterprises that look like theirs but also want to know if and how a product meets those requirements.

- **Innovation:** Although Bynder has its own AI, its investment in AI, GenAI and automation have yielded fewer product features and capabilities compared to other vendors in this research. Specifically for AI-generated new content (e.g., images, video and presentations), this can only be accomplished through a third-party integration and is not natively included in the platform.

- **Packaging:** Bynder's packaging of add-ons lacks transparency for buyers; some product features are packaged in ways that hide what constitutes an add-on. Buyers interested in additional asset storage, AI capabilities and some connectors face an uphill battle to determine what additional cost to budget for, which may slow down sales cycles or block budget approvals.

Canto

Canto is a Niche Player in this Magic Quadrant. Its Canto DAM platform is broadly focused on serving as an intelligent and integrated hub for creative collaboration that is closely connected with the rest of the tech stack. Its operations are primarily in North America, EMEA and Australia. Canto has a midmarket and SMB focus, with clients in education, manufacturing, healthcare and

other verticals. Canto recently acquired MerlinOne, a DAM company offering AI and visual search capabilities, and Image Relay, which offers solutions that unite DAM and product information management. Canto's roadmap includes improvements to its UI, with a focus on libraries, enhancements to its AI visual search and similar image search functionality.

Strengths

- **User interface:** Canto offers a visually clean UI with easy navigation to different DAM areas, such as end-user collections, libraries, style guides, branded portals and workspaces. Canto has rolled out a new feature called App Switcher that is located in the header bar on the homepage. App Switcher allows users to quickly access workspaces and brand portals without toggling screens, and quickly switch between tasks on the DAM.

- **AI enablement:** Canto offers AI visual search that is currently offered by few other vendors in the market. AI visual search uses AI to scan every frame within a video and image and allows end users to quickly search and find assets that fit their specifications using natural language queries (e.g., a family at a campsite). AI visual search does not rely on existing asset metadata and keyword tagging and provides benefits such as more effective and faster retrieval of desired assets from an organization's DAM library.

- **Integrations:** Canto offers 40-plus built-in integrations, and assets stored in its DAM are accessible across different tools in content workflows, such as content marketing, workflow management and social media management platforms. In addition, Canto has packaged the most common API calls into Canto Universal Connector to save development time when building out connections to other systems; this feature is available at no extra cost.

Cautions

- **GenAI:** Canto DAM does not offer GenAI prompt-based image, video or creative brief generation capabilities. Buyers looking for a solution that can ease the burden of creating content variants for personalization should seek other solutions.

- **Product breadth and depth:** Canto offers a basic DAM with standard capabilities such as asset ingestion and sharing. Many advanced functionalities are absent, such as native content performance analytics or customizable reports, which limits marketing's ability to measure its impact or efficiency gains driven by the DAM investment.

- **Cost complexity:** Canto lacks priority capabilities needed by large enterprises, such as real-time publication to e-commerce sites, without heavy investment in costly add-ons. For example, this can be achieved via its Media Delivery Cloud, AI visual search, video transcription and subtitle generation, but requires additional fees per add-on in customer agreements.

Canto did not respond to requests for supplemental information or review the draft contents of this document. Gartner's analysis is, therefore, based on other credible sources.

CELUM

CELUM is a Niche Player in this Magic Quadrant. Its three main products (Product Content Management, Creative Content Collaboration and Brand Management) are built on the CELUM Content Supply Chain Management Platform and are focused on providing enterprise scalability and streamlining collaboration. Its operations are mostly centered in EMEA, and its clients tend to be B2B enterprises in the consumer packaged goods, life sciences, manufacturing and retail industries. Its roadmap includes the ability to embed viewable instances of the CELUM DAM in e-commerce websites with smart content syndication and expansion of both its GenAI and content dynamization capabilities.

Strengths
- **Asset ingestion**: CELUM offers a variety of ways to ingest assets, ranging from uploading via a mobile app to a back-end web UI. Its Drive application can also be used to do bulk uploads and sync assets into a local location.

- **Content collaboration**: CELUM provides Kanban boards in its workrooms, which allow for in-content annotation on any file type and the addition of information, subtasks and attachments. This streamlines workflows by allowing multiple users to discuss and collaborate on assets in a separate workroom.

- **Customer experience**: CELUM has one of the fastest product implementations among the vendors evaluated. It is responsive to customer requests and recently released brand guidelines and template capabilities based on customer feedback. CELUM releases product updates on a six-week cadence.

Cautions
- **GenAI capabilities**: While AI content generation capabilities are on its product roadmap, CELUM lags other providers evaluated, as its AI features are currently limited to functions such as AI-generated metadata. This is an obstacle for those who prefer deploying AI to create a high volume of image- or video-based assets.

- **Product portfolio**: CELUM's nonintuitive UI requires users to switch between products to set up and manage workflows and brand portals. Brand Management and Creative Content Collaboration are the integral components of its DAM, but most complex enterprises would need to purchase additional modules. For example, the management of multiple brands with advanced metadata capabilities (e.g., product information data and AI autotagging) would require an additional investment.

- **Geographic strategy**: CELUM's customers are predominantly in EMEA, with a small client presence in North America. While it is focused on expanding into other regions through partner programs, enterprises that need localized service support may have limited options outside of EMEA.

Cloudinary

Cloudinary is a Visionary in this Magic Quadrant. Its Cloudinary Assets product is mainly focused on providing visual storytelling capabilities and allowing users to manage large volumes of

content more easily. Its operations are primarily in North America and EMEA. Its clients are largely B2C enterprise and midmarket organizations in the automotive, retail, media and entertainment, and travel and hospitality industries. In 2024, Cloudinary added compliance with the Coalition for Content Provenance and Authenticity (C2PA), and natural language and visual search to help users find assets quickly. GenAI editing is being introduced to improve content quality and brand compliance, and automatic video styling to provide personalized videos that enhance user engagement.

Strengths

- **Technology innovation:** Cloudinary has shown innovative use of technology, such as native support for ideation insights and video modification using AI, as well as GenAI content creation. This innovation enables users to reduce costs, save time and scale more rapidly.

- **Customer success:** Cloudinary's commitment to customer success stands out, with proactive customer engagement at both the executive and user levels. This provides a high degree of confidence in its ability to support users with both new capabilities and improvements.

- **Sales strategy:** Cloudinary strategically targets specific buyer personas within its ideal customer profiles, using marketing, account management, customer success and partner enablement. This collaborative go-to-market approach makes its customer acquisition strategy effective. Messaging based on buyer personas helps buyers validate their decisions and reach consensus on technology investments faster.

Cautions

- **DAM capabilities:** Cloudinary Assets' core DAM capabilities are average among those evaluated in this research. For example, it has fewer metadata fields compared to other vendors evaluated. This average level of functionality compared to competitors may limit Cloudinary's appeal to larger enterprises with more advanced needs.

- **Cost of integrations:** Cloudinary charges per user for Adobe Creative Cloud Connector (InDesign, Illustrator and Photoshop) integration, which is unusual compared to other vendors evaluated in this research. It also charges for the LinkrUI add-on, which integrates the Cloudinary DAM to external applications such as Microsoft Office/365, and adds the DAM instance in the external UI. These additional costs may drive up the initial investment, particularly for multibrand organizations with internal and external agencies.

- **Creative development focus:** Cloudinary serves a variety of users, and for most brands, the DAM is not going to be used solely by creative teams. While impressive, Cloudinary's innovations and recent product releases focus mostly on content generation rather than core DAM capabilities such as asset sharing and distribution, and emerging DAM capabilities such as content performance analytics.

Fotoware

Fotoware is a Niche Player in this Magic Quadrant. Its Fotoware DAM is mainly focused on streamlining workflows, from ingestion to distribution. Its operations are mostly focused in EMEA,

and its clients tend to be midmarket B2B brands, with a concentration on areas such as galleries, libraries, archives and museums (GLAMs), manufacturing, media and entertainment, and retail companies. Its roadmap includes the integration of AI-augmented workflows, content-tagging abilities using the Coalition for Content Provenance and Authenticity (C2PA), and a cloud-native solution for workflow automation such as rejecting/approving content or redirecting suspicious content to additional verification workflows. Its recent improvements include increasing efficiency in batch metadata editing and employing AI for automatic tagging.

Strengths

- **Digital consent management**: In line with privacy regulations such as the General Data Protection Regulation (GDPR), Fotoware facilitates the process of collecting and managing consent from individuals who are identifiable in visual content, such as images. It also implemented a guardian consent process in response to customer feedback, further streamlining consent management for users.

- **Accessible platform**: In addition to its main DAM platform, Fotoware offers a mobile app and desktop client, FotoStation, to provide flexibility in uploading and distributing content. FotoStation also offers various metadata editor layout templates, allowing users to create their own custom layouts.

- **Image and video editing**: Fotoware offers a range of integrated asset transformation capabilities, such as formatting and resizing images and adjusting the colors and brightness of a video during playback or while downloading. This benefits users who require on-the-go editing capabilities for their assets.

Cautions

- **Templating**: Fotoware's templating abilities lag those of other providers, as it offers a limited amount of predefined templates, most of which are basic. Users who rely on or prefer templates for content generation will need to put more effort into building content.

- **GenAI innovation**: Though Fotoware has been established longer than most other DAM providers, it has struggled to keep up with industry GenAI advancements. For example, AI-related content creation and editing abilities are scheduled for late 2025 in its portfolio roadmap. The lack of AI content generation functionalities can hinder content pipelines.

- **Reporting and analytics**: Fotoware does not offer reporting and analytics capabilities natively on its platform. This is only available through third-party services. For instance, to access asset usage metrics, users will need to build and download reports through Microsoft Power BI or Excel.

Hyland

Hyland is a Challenger in this Magic Quadrant. Its Nuxeo Platform for DAM is mainly focused on a product asset management approach to connect product content, data and assets throughout the organization. It is sold as a cloud subscription or an on-premises, client-managed solution. Hyland is headquartered in the U.S., with customers primarily in North America and EMEA. Its customers

tend to be large organizations within the retail, consumer packaged goods, financial services, and media and entertainment industries. Hyland focuses heavily on the alignment of operational data with product content. Its roadmap features updates in GenAI content creation, video enhancements, interactive content types, publishing and analytics to fuel the entire content life cycle. Recent attention has heavily focused on product asset management and operational system integration (PLM, MDM, PIM).

Strengths

- **Market understanding:** Hyland has quickly developed image and video asset modification within the DAM. It can configure business logic with custom GenAI models through a third-party integration trained for individual brands. This enables users to apply content creation and brand management use cases within the DAM.

- **Marketing operations:** The Nuxeo Platform extends DAM beyond a core repository to include capabilities that integrate data and workflows beyond marketing into product management to support the product supply chain. These functions allow users to centralize more marketing operations.

- **Pricing structure:** Hyland's pricing model is based on users, assets under management and API calls. This simple and transparent pricing structure gives buyers a clear understanding of cost.

Cautions

- **Product marketing focus:** Hyland's heavy focus on product marketing use cases may come at the cost of attention to other usage types or industries. Its targeted focus may cause inattention to specific features for other industries, like templated compliance controls and automated audits for regulated industries, for example. This may limit market presence over time as the rest of the vendor landscape expands more generally.

- **Partnerships:** Hyland's DAM practice doesn't have as many dedicated partnerships with industry consultancies or global SIs as others in this market. This activity may be critical as a building block for the seamless integrations buyers need.

- **Roadmap:** Hyland's most intriguing roadmap enhancements focus on PLM and PIM integrations/product-related capabilities or packaged connectors many others in the market have already established. For example, most other vendors in this market already have natural language search and CI Hub Connector to Microsoft Office/365, Adobe Premiere and Figma. The platform roadmap may not be as attractive to organizations in adjacent industries that do not have a product-based go-to-market strategy.

MediaValet

MediaValet is a Niche Player in this Magic Quadrant. Its MediaValet DAM product is focused on helping clients securely and efficiently deliver content at scale to achieve their business goals. MediaValet's operations are primarily focused in North America, with a strong emphasis on midmarket companies across verticals such as higher education, nonprofit and manufacturing. MediaValet is in the midst of rolling out a major enhancement to its platform with its HotDAM!

Experience (HDX) product, which will offer a cleaner and mobile-responsive end-user interface with more asset filtering options, thumbnail and preview features, and more efficient workflows (e.g., sharing or uploading assets in bulk with fewer clicks). MediaValet's roadmap includes AI-powered semantic and similar image search capabilities as well as MediaValet Proofing, powered by PageProof.

For this iteration of the Magic Quadrant, Gartner evaluated MediaValet's classic DAM product. The HDX product is not yet generally available.

Strengths
- **Customer experience:** MediaValet offers superior client onboarding and support through dedicated customer success and implementation managers, full-service asset migration, on-demand MediaValet Academy, 24/7 access to technical support and faster overall DAM implementation times than other providers.

- **Pricing transparency:** MediaValet's pricing and licensing model is straightforward, with a limited number of tiers based on access to advanced features. MediaValet allows client organizations to add unlimited users and user groups to their DAM, set up unlimited branded portals, and offers personalized onboarding to all customers as part of their subscription. It also provides discounts for nonprofits.

- **Templating:** MediaValet offers users a powerful built-in brand templating tool, in partnership with Marq (a brand templating platform). Customers can create and store customizable brand templates such as brochures, business cards and social posts within the MediaValet DAM or import templates from InDesign, adding granular editing permissions for noncreative users. This enables faster and easier on-brand content production.

Cautions
- **AI innovation:** MediaValet does not offer GenAI prompt-based image, video or creative brief generation capabilities, which facilitate faster personalized content production. It also does not offer capabilities such as AI-augmented workflows, ideation insights and similar image search.

- **Migration efforts ahead:** As of publication, MediaValet's existing customers have the flexibility to toggle between the new HDX and the classic version of its platform. However, MediaValet plans to sunset its classic product and migrate existing customers to the HDX product in the future. Customers might need extra support, time, resource investment and training during this migration period, which could be a challenge for busy marketing and creative teams.

- **Ownership transition:** In April 2024, MediaValet announced it finalized its definitive agreement to be acquired by an affiliate of Symphony Technology Group, a private equity firm. Customers and prospective buyers should weigh how potential changes in leadership and operations may affect near-term product capability enhancements, staffing, pricing and contracts, and future R&D investments.

OpenText

OpenText is a Visionary in this Magic Quadrant. Its OpenText Media Management product is mainly focused on connecting the stages of content creation and distribution to enable a uniform omnichannel experience. Its operations are primarily in North America and EMEA, and its clients tend to be large enterprises in the consumer packaged goods, media and entertainment, government and utilities industries. OpenText customers now have an option to use a private trainable AI for audio and video asset identification, which will flag content that has expired components (e.g., logos, talent) to help drive efficiency with review workflows. OpenText's roadmap includes advanced asset search capabilities through the addition of large language models. Additionally, it plans to release AI-driven content recommendations that will suggest relevant assets based on customer user behavior and preferences.

Strengths
- **Packaging:** The packages for OpenText's on-premises and SaaS products are all fully customizable. Customers and prospective buyers have the flexibility to tailor their DAM purchase specifically to their enterprise's needs. For example, customers can choose add-ons or customize the existing packaging (e.g., change the number of users or number of nonproduction environments).

- **Asset findability:** OpenText has dynamic search capabilities that allow users to filter by asset type, folder, collection or tag. All identified assets will appear in the search bar dynamically as the user types a search term. For example, a user types a keyword or phrase, and all associated assets, folders and collections will appear in the search bar prior to finalizing the search. This allows users to quickly find the content that's most relevant to their search without loading all the search results.

- **Deployment and languages:** OpenText is one of the few vendors evaluated that offers an on-premises option alongside its SaaS option in a private cloud. It can support multitenant instances, and its user interface can be configured in numerous languages, including multibyte characters like Chinese.

Cautions
- **Templating:** OpenText uses a combination of third-party, prebuilt integrations (e.g., Mediawide Asset Builder, Adobe InDesign Document) to support templating functionality. Mediawide Asset Builder can be accessed within the DAM, but its support is limited to locking a few aspects of an image and does not include documents or Microsoft PowerPoint files.

- **Vertical industry strategy:** OpenText was one of the few vendors evaluated that did not detail strategic support for any industry vertical. While OpenText can support all industries, Gartner client inquiries from 2023 through September 2024 reveal a preference for vendors with a track record of supporting their industry. Customers and prospective buyers should weigh cost and time considerations for onboarding their DAM.

- **Operational changes:** In July 2024, OpenText announced a 1.7% reduction of its workforce throughout the company. Although it has reported plans to hire new roles in sales, professional

services and engineering, customers should examine OpenText's ability to provide the necessary resources to support the product.

Orange Logic

Orange Logic is a Challenger in this Magic Quadrant. Its OrangeDAM broadly maximizes content usage, including enhanced video capabilities through media asset management. It is sold as a cloud subscription. Orange Logic is headquartered in the U.S. and has a predominantly North American presence, with small contingents in EMEA and APAC. Its clients tend to be large organizations in media and entertainment, technology, consumer packaged goods, retail and fintech. Orange Logic has invested heavily in video capabilities and AI, and has advanced project management workflows, vertical-specific AI models and content component building on its roadmap. It recently launched OrangeU, an online learning hub to train users on OrangeDAM capabilities and administration.

Strengths

- **Video capabilities:** OrangeDAM was one of the first vendors among those evaluated to prioritize video. Its video connectivity is more advanced than others in this space for its depth of video editing and storage capability within the DAM. It also sells a MAM product that seamlessly integrates with the DAM.

- **Market responsiveness:** Recent roadmap enhancements have added 30-plus integrations (including over 70 GenAI tools), helping it quickly adapt to AI innovations in the marketplace, such as generation of assets, briefs, presentations and videos from prompts.

- **Packaging:** As an integrated, suite-based platform, OrangeDAM offers the functionality of an all-in-one platform with the composability of separate products. Users can purchase capabilities and functions piecemeal without being locked into capabilities they don't need or use.

Cautions

- **Pricing strategy:** While customization can be appealing, having too many add-on capabilities and modules becomes costly and confusing. Though Orange Logic has stated its intention to repackage its product in 2025, users must understand more than half a dozen potential add-on capabilities, such as approvals and templates, in addition to licensing and user fees.

- **Market presence:** While Orange Logic's products and capabilities are highly competitive, they're not as well known by buyers in the DAM market. The vendor's marketing activities and event participation are significantly lower than those of other vendors evaluated in this research. Its prebuilt integration network is limited to creative applications, CMS, social marketing management, personalization engines and CMPs, and does not include other marketing execution channels, such as MMH or B2B MAPs. Prospective buyers will need to weigh the time required to build consensus on a newer technology purchase.

- **Portfolio complexity:** Orange Logic has a myriad combination of add-ons and products, such as marketing resource management and MAM. It is not immediately clear which product(s) customers purchase as they mature and scale or who should be the appropriate product owner.

For example, clients that need a brand portal must make an additional product purchase, forcing them to forecast future needs at initial contracting.

Sitecore

Sitecore is a Visionary in this Magic Quadrant. Its DAM, Content Hub, is focused on facilitating collaboration of digital assets and marrying content and experience. Its operations are focused mostly in North America, EMEA and APAC, and its clients tend to be enterprises in the financial services, healthcare, manufacturing, retail, and travel and hospitality industries. Recent enhancements include natural language search, text and content generation as well as image-based search (which allows users to search for an image using an image). Sitecore's roadmap features AI to modify 3D assets and review content submitted by external partners, enhancements to the front- and back-end UI and improved content production workflows, including in-app messaging and annotation.

Strengths

- **Product capabilities**: Sitecore's DAM offers a wide range of product capabilities beyond the basic and expected capabilities — asset analysis (dashboards for usage and search analytics) and asset organization — including operational workflow capabilities such as editorial calendars. Its calendar view helps users see what assets need to be created and approved, and the campaign schedule right in the DAM.

- **Integrations**: Sitecore is one of the few vendors evaluated that has native, bidirectional prebuilt integrations with martech solutions, such as CMP, CDP, e-commerce solutions, MWM, personalization engines and CMS solutions. This also extends to enterprisewide tools, such as digital workplace applications (Microsoft Office/365, Google Drive), collaboration work solutions and sales force automation CRMs.

- **Customer listening**: Over and above a customer advisory board, Sitecore's associated user research initiative dedicates a specific team to actively engage customers, review their problems within the DAM market and identify areas for product improvement. For example, its visual search capabilities were developed based on feedback from its customer success program.

Cautions

- **Platform complexity**: Sitecore's DAM is sophisticated and requires much support as well as technical architects to manage and implement it. Enterprises must consider the additional cost of finding the right professional services for both implementation and continued maintenance required to support additional use cases within the DAM.

- **Content generation**: Sitecore doesn't currently offer GenAI to generate new images, videos and text within a document or presentation but has this on its roadmap. Among others evaluated in this research, Gartner has observed many vendors have the ability to generate new images and videos within their platform.

- **Operations restructure:** Recent announcements about Sitecore's operations have revealed changes and shifts within its leadership, as well as an organizationwide reduction in its workforce. Customers should examine Sitecore's overall ability to provide the depth of resources and product support for its complex customers.

Smartsheet

Smartsheet is a Challenger in this Magic Quadrant. Its Brandfolder by Smartsheet DAM product is mainly focused on content creation and automation, and distributing assets, both internally and externally. Its operations are mostly focused in North America, with a limited presence in EMEA and APAC, and its clients tend to be midsize and large enterprises in the consumer packaged goods, education, manufacturing and retail industries. Recent enhancements include the use of GenAI to suggest a description for uploaded images that can be modified and saved into the metadata. Smartsheet plans to enhance its AI capabilities for content tagging, content modification and search to help improve findability.

Strengths
- **Core DAM capabilities:** Smartsheet's capabilities cover all basic functions, such as asset ingestion, sharing, governance and organization, as well as its content creation capabilities, including GenAI and asset transformation. It also has advanced metadata and tagging capabilities that improve search and asset findability.

- **Templating:** Smartsheet's templating capability not only applies to text but also images and emails. End users can edit multiple asset formats within the templating guidelines. Its templating is "smart" because it can add a countdown to templates, allowing content to dynamically change as users interact with it.

- **Partner networks and localization:** Smartsheet's Aligned Partner Program comprises over 400 global partners — ranging from business consultants to systems integrators — who obtain their certification from Smartsheet directly. Additionally, its user interface, including metadata tagging and asset descriptions, is available in over 20 different languages.

Cautions
- **Product migration:** Brandfolder and Smartsheet capabilities are still merging. Therefore, customers and prospective buyers will need to operate two solutions to bring their workflow and asset management capabilities together.

- **Roadmap:** Smartsheet's roadmap primarily focuses on its platform's infrastructure — folding in its acquisitions, Brandfolder and Outfit.io — rather than innovations. The DAM product capabilities to come are primarily improvements to content publishing and enhancements to AI-powered asset tagging.

- **Upcoming acquisition:** Blackstone and Vista Equity Partners announced in September 2024 their intent to purchase Smartsheet. Private equity acquisitions of technology vendors raises questions about the future of a vendor's operations and product strategy. Customers and

prospective buyers should consider the potential for changes to the product and pricing once the acquisition is final.

Storyteq

Storyteq is a Leader in this Magic Quadrant. Its Storyteq DAM product is mainly focused on unifying marketing operations and the content supply chain, emboldened by GenAI. Its operations are primarily focused in EMEA, but with a growing presence in North America, and its clients tend to be midsize and large-enterprise clients in the automotive, consumer packaged goods, retail, and travel and hospitality industries. Recent enhancements to Storyteq DAM include adding an AI trust shield to all assets and enhancing its ability to autotag assets for campaign optimization. Storyteq plans to continue optimizing creative generation and adding AI performance scores to aid content quality checks.

Strengths

- **Innovation:** Of the vendors evaluated in this research, Storyteq has one of the most extensive lists of native AI-generated enablement capabilities for asset creation and modification, and marketing materials (e.g., briefs, email outline, content template). It integrates creative, customer insights and media to enable the production of agile content through its Marketing Advertising Supply Chain Optimization (MASCO) initiative.

- **Brand asset management**: Storyteq DAM can support multiple portals and centers for both front-end and back-end users to access and use assets within the parameters of their permissions. Its computer vision capabilities provide an asset description and keywords to increase findability. Additional releases include a new self-serve CMS editor that can be accessed directly from the DAM.

- **Global enterprise support:** Storyteq has several partnerships with global consultancies and technology independent software vendors to help extend its product's utilization. Storyteq's DAM user interface can be configured to support any language, and it supports multitenant instances. These features enable global enterprises to manage their various brands' content using one provider.

Cautions

- **Pricing:** Storyteq offers flexible pricing and packaging; each deal is customized for the enterprise's use cases and business requirements. However, many of its innovative and advanced GenAI capabilities cost more. Customers and prospects must assess their ability to fully utilize the GenAI capabilities and generate a business case.

- **Content operations:** Storyteq DAM can support the entire content supply chain (e.g., the plan, creation, management and distribution stages), but it requires enterprises to conduct more prework and have a robust metadata and taxonomy strategy in place prior to implementation. Some of the GenAI capabilities are data-intensive and only effectively work and scale under a sophisticated data strategy.

- **Market visibility:** Because its customer base is primarily in EMEA and its product focus was previously on agency services, Storyteq has yet to noticeably penetrate other geographic regions. Storyteq is one of only a few vendors evaluated in this research that does not have a customer recognition program, which aids in product visibility.

Inclusion and Exclusion Criteria

Vendor solutions must align with the earlier market definition and successfully adhere to Gartner's criteria as defined below.

Inclusion Criteria

To qualify for inclusion in Gartner's 2024 Magic Quadrant for Digital Asset Management Platforms, providers need to meet the following criteria:

- A provider must demonstrate active participation in the DAM platform market as a pure-play provider of a stand-alone DAM platform without requiring the purchase of other modules or products from the vendor. It must also meet Gartner's definition for the DAM platform market.

- At a minimum, a DAM platform must perform:

  - **Asset ingestion** — Ingestion (extraction) of various forms of assets including, but not limited to, text, graphics, images, videos, audio and design files. Back-end users (e.g., admins or librarians) should be able to easily bulk-upload assets, including metadata.

  - **Organization and storage** — DAM platforms must have the ability to organize assets by using metadata tagging and taxonomy management. DAM platforms must be able to provide storage of various forms of digital assets including, but not limited to, text, graphics, images, videos, audio and design files.

  - **Search and findability** — DAM platforms must have a searchable repository and/or library that allows users to easily locate and retrieve applicable assets.

- The provider must have at least 100 paying customers that use the vendor's DAM platform.

- The provider must have acquired 15 net new customers in the calendar year 2023.

- The provider must have at least 70% of 2023 calendar year revenue for DAM platform attributable to software, either SaaS/subscription revenue or perpetual license sales (on-premises).

- The provider must meet one of the following (reported as constant U.S dollar currency):

  - At least $10 million in software license revenue from the DAM in calendar year 2023 and enough cash on hand to fund a year of operations at the current rate of cash depletion

  - Or at least $5 million in software license revenue from the DAM in calendar year 2023

  - An additional 20 paying new customers compared to calendar year 2022

- And at least enough cash on hand to fund a year of operations at the current rate of cash depletion (see also definitions in Note 1)
- The provider must have:

  - A physical presence in at least one of the two following regions: North America or EMEA.

  - Sales support in at least two regions (North America, LATAM, EMEA, Asia/Pacific).

- The provider must rank among the top 25 organizations capturing a strong degree of customer interest as defined by Gartner for this Magic Quadrant. Data inputs used to calculate customer interest include a balanced set of measures, such as:

  - Gartner client trend data

  - Social media engagement

  - Media presence

  - Brand engagement (e.g., search volume and traffic)

Exclusion Criteria

Vendors will be excluded from this research if the vendor's DAM platform offering cannot be purchased as a stand-alone product; for example, a DAM module that is provided as part of a product information management (PIM) solution. Gartner defines the product information management (PIM) market as packaged solutions that enable product, commerce and marketing teams to create and maintain an approved shareable version of rich product content. PIM makes a single, trusted source of product information available for multichannel, commerce and data exchange.

Evaluation Criteria

Ability to Execute

Gartner analysts evaluate providers on the quality and efficacy of the processes, systems, methods or procedures that enable IT provider performance to be competitive, efficient and effective. Performance must also positively impact revenue, retention and reputation within Gartner's view of the market.

Product/Service

For DAM platforms, we evaluated the providers' capabilities for mandatory and common features as laid out earlier in the Market Definition.

Overall Viability

For each vendor we considered:

- Its relative size in terms of customers, revenue, and the scale, strength and resilience of its ecosystem

- The impact of past acquisitions and the potential for future acquisitions

- The financial stability and continuity of its offerings in this market

- The ability and effectiveness of its partnerships to improve viability

- The size and quality of its active user community relative to its target market

- The availability and effectiveness of professional and consulting services

- Its evidence of R&D investment for its DAM platform product

Sales Execution/Pricing

For each vendor we considered:

- Revenue and customer growth

- Presales activities and the structure that supports them

- The clarity and predictability of its pricing models and flexibility

- Its product-led growth initiatives

Market Responsiveness and Track Record

For each vendor, we evaluated its ability to:

- Quickly adapt, respond and change direction to achieve competitive success as opportunities develop, including how its product is updated

- Ability to support customer needs as those needs evolve

- Fulfill its roadmap promises

Marketing Execution

For each vendor, we assessed the degree to which it has:

- Captured mind share, demonstrated thought leadership and gained a solid reputation in the market

- Demonstrated its ability to have a strong market visibility in the geographic markets they serve

- Executed marketing and partnership programs to expand its influence

Customer Experience

For each vendor, we considered:

- Its ability to provide technical support and implementation

- Its availability and viability of internal customer service and support capabilities, including customer success programs, support resources, systems and policy

- Support outside the vendor's home region

- The reach and availability of service implementers, and efforts to expand these, such as training and certification programs

Operations

For each vendor, we considered:

- Its overall operational health, including stability in its workforce and changes in leadership

- Its ability to deliver for customers consistently and efficiently in their local language

- Its partner network and certifications

Table 1: Ability to Execute Evaluation Criteria

Evaluation Criteria ↓	Weighting ↓
Product or Service	High
Overall Viability	High
Sales Execution/Pricing	Medium
Market Responsiveness/Record	High
Marketing Execution	Low
Customer Experience	Medium

Evaluation Criteria ↓	Weighting ↓
Operations	Medium

Completeness of Vision

Gartner analysts evaluate providers on their ability to convincingly articulate logical statements. This includes current and future market direction, innovation, customer needs, and competitive forces and how well they map to Gartner's view of the market.

Market Understanding

We assessed each vendor's understanding of:

- Current and emerging trends, client priorities and specific needs in the DAM platform market

- How its planning and vision of the DAM platform market addresses market conditions and customer needs

- Its DAM technology innovations and initiatives

Marketing Strategy

We assessed each vendor's marketing strategy for:

- Clear articulation of an offering's value proposition in the context of the customer's business

- Its product/service bundling that meets customer needs

- Its mind share and customer advisory boards and communities

Sales Strategy

We assessed each vendor's sales strategy for:

- The right balance of direct and indirect sales and partner strategy

- Its ability to extend scope and depth of market reach, expertise, technologies, services and customer base

- The strength and reach of its partner network

- Its dedication to sales resources, and an understanding of how it reaches and acquires customers

Offering (Product) Strategy

We assessed each vendor's offering (product) strategy for:

- A DAM platform product's unique and differentiating capabilities

- The relevance of a provider's integration and ecosystem partnerships

- Differentiation of its product roadmap

Business Model

For each vendor, we assessed:

- Breadth and depth of any M&A strategies and/or key partnerships that enhances the viability of its DAM platform product

- Alignment and positioning, packaging and pricing strategies for its DAM platform product

- Ability to maintain long-term customers and sustain customer relationships

Vertical/Industry Strategy

For each vendor, we assessed:

- The industries that the vendor focuses on, the industry-specific solutions (if any) that it offers, and how successful or differentiating these solutions are (or are likely to be)

- Vertical/industry-specific product enhancements for DAM platforms

- Vertical/industry-specific roadmap for DAM platforms

Innovation

For each vendor, we assessed:

- Vision of the market and thought leadership

- Plans to incorporate new technologies such as GenAI and machine vision in its product

- Its track record of anticipating or leading new trends in the market

- Specific innovations made to its DAM platforms capabilities

Geographic Strategy

For each vendor, we assessed its ability to:

- Utilize any region-specific partnerships to support locations and product capabilities that support the unique needs of customers in various regions

- Activate authorized resellers to extend the sale and use of its DAM product outside its "home" or primary geography

<p align="center">Table 2: Completeness of Vision Evaluation Criteria</p>

Evaluation Criteria ↓	Weighting ↓
Market Understanding	High
Marketing Strategy	Medium
Sales Strategy	Low
Offering (Product) Strategy	High
Business Model	Medium
Vertical/Industry Strategy	Medium
Innovation	High
Geographic Strategy	Low

Source: Gartner (January 2025)

Quadrant Descriptions

Leaders

Leaders in this Magic Quadrant demonstrate the ability to excel at core and advanced digital asset management platform capabilities for large enterprises. They have the most AI-generated capabilities natively built into their platforms and support more advanced features. These capabilities include code generation (e.g., creation and management of code-based entities, such as forms, message templates or surveys). They also include real-time content generation (e.g., creation of contextualized content using real-time geolocation, inventory or other data to produce creative or interactive elements, such as timers, maps or carousels). Leaders in this market set the pace for the future of DAM and its role in the content supply chain. Their roadmaps tend to be robust and solidify their product's positioning.

Challengers

Challengers perform well across all use cases evaluated in Gartner's research and they continue to expand their customer base. However, their Completeness of Vision for this market falls short of Leaders due partly to a lack of a coordinated strategy across various products in their portfolio and absence of unique DAM platform innovation within this market.

Visionaries

Visionaries are defined by their strong performance in their products' innovation and vision for this market. They excel in their use of GenAI and innovation in key capabilities such as asset sharing, asset transformation and multilingual deployment. But their Ability to Execute may be hindered due to their focus on capabilities that are for very specific use cases, such as creative development or the perceived complexity of using their product.

Niche Players

Niche Players support core digital asset management platform capabilities and they perform well in specific business models, industry verticals or geographies. They embrace a narrow view of the market, which makes their technology a fit for very specific verticals or business models. Niche Players' offerings can be suitable for organizations that require local presence and support, want a close relationship with a provider, or seek a platform that addresses specific industry use cases and functional requirements.

Context

The DAM platform market is a well-established market, and the release of GenAI has revived it. It is no longer a "library" that stores assets, but a tool that can support content management — internally and externally — as well as the creation of new assets within the platform itself. DAM platforms sit at the center of content operations, acting as the source of truth behind asset management and use. This Magic Quadrant emphasizes stand-alone DAM platforms and their ability to meet the needs of large and midsize organizations primarily located in North America and Europe. While we recognize many providers in this Magic Quadrant also sell to organizations in other regions, this year's evaluation reflects the needs of Gartner's audience.

Increasingly, DAM platforms have overlapping capabilities with tools such as MWM, PIM, CMP and DXP (i.e., planning, ingestion, creation, organization, storage, publication and distribution). As a result, the lines between their capabilities are often blurred. However, some DAM platform

vendors in this market have enhanced their content workflow capabilities either through the existing DAM platform or through another product in the vendor's product portfolio. While DAM platforms have numerous capabilities, the core ones are asset distribution, ingestion, organization and storage, and search and findability. The best-performing vendors in this year's Magic Quadrant are able to provide these capabilities natively within their DAM platforms and have the most advanced GenAI capabilities (e.g., creative, transformation, metadata tagging to improve search and findability).

Market Overview

The DAM platform acts as the center of the content supply chain. It is a foundational tool that does not get much attention because its primary function is storing digital assets. However, enterprises are taking a renewed interest in DAM platforms, driven by three trends:

- **GenAI** — DAM platforms provide a controlled environment where users can apply GenAI to specific use cases.

- **More channels** — The 2023 Gartner Multichannel Marketing Survey showed that organizations managing 11 or more marketing channels are twice as likely to successfully optimize their multichannel marketing investment compared to those managing fewer channels. [1] What those various channels need is content, and DAM platforms help manage and distribute content across martech and enterprisewide ecosystems.

- **Technology streamlining** — According to the 2023 Gartner Marketing Technology Survey, organizations use, on average, 2.5 DAM platforms [2] — perhaps due to missing features and/or undiscovered features such as brand portals and a decentralized martech stack. As organizations continue to scrutinize their martech investments, they are heavily examining tools with overlapping capabilities for their value, potential ROI and/or savings, and whether consolidation is the right choice.

Those examining DAM platforms should be cognizant of the following market conditions as they consider a purchase of a DAM platform.

Continued Maintenance Requirements for Success

DAMs are often seen as solutions that, once set up, do not need ongoing support. However, DAM platforms are highly configurable tools that typically require more strategy and cross-functional prework than organizations plan for. Additionally, organizations need to have a dedicated librarian, or asset manager, to support the ongoing maintenance of the DAM platform.

Vendors routinely offer customers and prospective buyers their professional services or suggest third-party options to help organizations build a metadata and taxonomy strategy during the initial onboarding, and maintain integrations (both out of the box and custom-built). However, standards for initiating this development are lacking, and vendors often inadequately communicate to prospective buyers how to prepare for it, let alone offer guidance on maintenance. Nor do they communicate the essential need to maintain and manage updated versions of a given integration or changes in vendors connected to the DAM.

Increased Attention on Regulated Industries

Sixty-seven percent of vendors (10 of 15) evaluated in this research mentioned that regulated industries — including automotive, financial services, healthcare, life sciences and pharmaceutical — are either top customer segments or an active pursuit.

As these industries recalibrate their marketing strategies, content management is critical. These industries often have a multi-business-unit organization and need robust administrative and regulatory compliance controls to maintain access to digital assets. An important capability these industries require is brand compliance management. Generated assets are becoming more common within DAMs. With increased access to these tools, content provenance capabilities must be included, so organizations have a known history of an asset's original creation with metadata that updates the information and changes to the AI-generated asset. These industries also require an auditable and systematic record of an asset's use so they can quickly identify who had access to the asset as well as how and where the asset was used.

A Backbone of Content and Creative Workflows

A common pain point for end users is managing and automating content and creative workflows. Some of the workflow management capabilities of DAMs encroach into the MWM space, which causes confusion over which tool to invest in. Some vendors evaluated in this research offer a complementary MWM tool to enable the workflow automation capability, but some DAMs have this capability built in. Many DAM buyers need and use it for creative and asset ingestion management and increasingly, buyers seek a solution that enables them to create rules to automate portions of the workflow. A DAM librarian must create the foundation of workflows within the DAM platform. They can do so by focusing on:

- **Digital rights management** — Establishing a chain of custody is an integral step in digital rights management. It allows librarians to put workflows in place to manage access, and processes for accessing or requesting assets. They can set expiration dates, apply watermarks and designate who can view or access content as well as how and where they can use it — for example, managing protected or copyrighted material, licenses and contracts.

- **Authenticity and content provenance** — This process is twofold, focusing on watermarking and AI content and governance compliance. This includes the ability to add watermarks to assets when sharing them externally; for example, an external user accesses an asset whose usage has expired. Organizations can also watermark content internally, especially if only a specific user or set of users is authorized to use the asset. Watermarking also helps with content authenticity — for example, some vendors automatically tag assets generated by AI, if the generated content follows brand guidelines and has been approved to appear in the DAM. Additionally, AI can be used to understand an organization's brand and ensure any new assets generated follow the brand's compliance.

- **Workflow automation** — Workflows can be created or used to automatically perform tasks and streamline processes, such as notifying users, tagging and categorizing projects, enforcing conditions around compliance or approvals, and creating audit trails, to name a few.

Automating such processes is critical. Sometimes vendors have the scenarios prebuilt, but more often than not, they need to be configured.

AI Governance

DAM platforms allow organizations to apply AI content use cases in a managed, audited environment. Within DAMs, they can more easily steer governance and provide oversight. DAM providers take AI governance and content authenticity seriously. Those invested in this area showcase their memberships in the Content Authenticity Initiative to demonstrate their commitment to the initiative. They often provide features that flag AI content upon upload and workflows to help users identify AI-generated content and tags within the platform.

Although GenAI is driving DAM platforms' renaissance, AI privacy laws, such as the EU Artificial Intelligence Act, could impact platform usage. Some providers in this research fall under the purview of the EU Artificial Intelligence Act; therefore, their DAM platform innovations, in particular GenAI, have been slower to reach the market. A recent Deloitte survey of over 700 leaders in France, Germany, Italy, the Netherlands, Spain, and the U.K. finds only "18% of Europe-based respondents report being highly prepared or very highly prepared in the areas of generative AI risk and governance." [3] This shows a general culture of skepticism about the ability to use GenAI. However, the EU sentiments contrast with those of North American companies, primarily U.S.-based.

Even with providers prioritizing AI-governance, organizations still need to configure how AI can be used for content generation and findability. To generate relevant content, organizations must still have a strategic taxonomy structure and metadata strategy for optimal performance of the AI. These will help AI learn your organization's working framework to enhance asset ingestion and creation. AI can also assist in compliance checks and add flags to assets to help approvers and users understand which parts of the content were AI-generated.

Acronym Key and Glossary Terms

Alt Tags	Alternative text or descriptions that help improve accessibility and SEO
CDP	Customer data platform
CMP	Content marketing platform
CMS	Content management system
Enterprise	Organizations with more than 1,000 employees
FedRamp	The U.S. Federal Risk and Authorization Management Program

GenAI	Generative AI
HIPAA	U.S. Health Insurance Portability and Accountability Act
MAM	Media asset management
MDM	Master data management
Midmarket	Organizations with 100 to 999 employees
MMH	Multichannel marketing hub
PIM	Product information management
PLM	Product master management
SMB	Organizations with fewer than 100 employees
WORM	Write once, read many

Evidence

[1] **P-23036 2023 Gartner Marketing Technology Survey.** 2023 Gartner Marketing Technology Survey: This survey aimed to investigate the state of technology acquisition, adoption, and use, including best practices for managing the technology stack, specific technologies in use, and the degree of their adoption. It was conducted online from the end of May through June 2023. In total, 405 respondents were surveyed in their native languages across North America (n = 200), Western Europe (n = 173), and the Nordics (n = 32). Qualifying organizations reported enterprise-wide annual revenue for fiscal year 2022 of at least $100 million, with 80% of the respondents coming from organizations with $1 billion or more in annual revenue. The respondents came from a variety of industries: financial services (n = 39), insurance (n = 39), manufacturing (n = 41), consumer products (n = 38), retail (n = 39), travel and hospitality (n = 34), healthcare (n = 38), pharmaceuticals (n = 31), media (n = 34), tech products (n = 34), and IT & business services (n = 38).All the respondents were required to be senior decision-makers, where the majority of their daily responsibilities mostly aligned with either business- or IT-focused marketing. 62% of respondents were aligned to the marketing function, 18% to brand management, 11% to product marketing and management, 9% to customer services, and 2% to IT or other business units.Disclaimer: The results of this survey do not represent global findings or the market as a whole, but reflect the sentiments of the respondents and companies surveyed.

[2] **P-22021 2023 Gartner Multichannel Marketing Survey.** 2023 Gartner Multichannel Marketing Survey: This survey was conducted to determine best practices for maximizing multichannel

marketing investments in response to evolving customer journeys in a fluid marketing environment. It was conducted online from November through December 2022. In total, 397 respondents were surveyed in their native languages across North America (n = 201), Western Europe (n = 161) and the Nordics (n = 35). Qualifying organizations reported enterprisewide annual revenue for fiscal-year 2021 of at least $100 million, with 83% of the respondents coming from organizations with $1 billion or more in annual revenue. The respondents came from a variety of industries: financial services (n = 61), manufacturing (n = 58), consumer products (n = 46), retail (n = 45), travel and hospitality (n = 45), healthcare (n = 44), pharmaceuticals (n = 35), media (n = 33), and IT and business services (n = 30).All respondents were senior leaders who manage multiple marketing channels or were responsible for the execution of their organizations' multichannel marketing strategies. Eighty-five percent of respondents were aligned to the marketing function, 9% to brand management, and 7% to sales or other business units. Disclaimer: The results of this survey do not represent global findings or the market as a whole, but reflect the sentiments of the respondents and companies surveyed.

[3] [European Organizations' GenAI Preparedness Has Increased, but Few Feel Ready for the Associated Risks](#), Deloitte Insights.

Note 1: Definitions

Software license revenue: Exclusive of revenue from professional services

New customers: A customer that has successfully deployed the DAM platform in a production implementation

Clients in production: A client that has successfully deployed the DAM. At a minimum, they have bulk uploaded their organization's assets

Evaluation Criteria Definitions

Ability to Execute

Product/Service: Core goods and services offered by the vendor for the defined market. This includes current product/service capabilities, quality, feature sets, skills and so on, whether offered natively or through OEM agreements/partnerships as defined in the market definition and detailed in the subcriteria.

Overall Viability: Viability includes an assessment of the overall organization's financial health, the financial and practical success of the business unit, and the likelihood that the individual business unit will continue investing in the product, will continue offering the product and will advance the state of the art within the organization's portfolio of products.

Sales Execution/Pricing: The vendor's capabilities in all presales activities and the structure that supports them. This includes deal management, pricing and negotiation, presales support, and the overall effectiveness of the sales channel.

Market Responsiveness/Record: Ability to respond, change direction, be flexible and achieve competitive success as opportunities develop, competitors act, customer needs evolve and

market dynamics change. This criterion also considers the vendor's history of responsiveness.

Marketing Execution: The clarity, quality, creativity and efficacy of programs designed to deliver the organization's message to influence the market, promote the brand and business, increase awareness of the products, and establish a positive identification with the product/brand and organization in the minds of buyers. This "mind share" can be driven by a combination of publicity, promotional initiatives, thought leadership, word of mouth and sales activities.

Customer Experience: Relationships, products and services/programs that enable clients to be successful with the products evaluated. Specifically, this includes the ways customers receive technical support or account support. This can also include ancillary tools, customer support programs (and the quality thereof), availability of user groups, service-level agreements and so on.

Operations: The ability of the organization to meet its goals and commitments. Factors include the quality of the organizational structure, including skills, experiences, programs, systems and other vehicles that enable the organization to operate effectively and efficiently on an ongoing basis.

Completeness of Vision

Market Understanding: Ability of the vendor to understand buyers' wants and needs and to translate those into products and services. Vendors that show the highest degree of vision listen to and understand buyers' wants and needs, and can shape or enhance those with their added vision.

Marketing Strategy: A clear, differentiated set of messages consistently communicated throughout the organization and externalized through the website, advertising, customer programs and positioning statements.

Sales Strategy: The strategy for selling products that uses the appropriate network of direct and indirect sales, marketing, service, and communication affiliates that extend the scope and depth of market reach, skills, expertise, technologies, services and the customer base.

Offering (Product) Strategy: The vendor's approach to product development and delivery that emphasizes differentiation, functionality, methodology and feature sets as they map to current and future requirements.

Modèle commercial : la solidité et la logique de la proposition commerciale sous-jacente du fournisseur.

Stratégie verticale/sectorielle : stratégie du fournisseur visant à orienter les ressources, les compétences et les offres pour répondre aux besoins spécifiques des différents segments de marché, y compris les marchés verticaux.

Innovation : Dispositions directes, connexes, complémentaires et synergiques de ressources, d'expertise ou de capital à des fins d'investissement, de consolidation, de défense ou de prévention.

Stratégie géographique : stratégie du fournisseur visant à orienter les ressources, les compétences et les offres pour répondre aux besoins spécifiques des zones géographiques situées en dehors de la zone géographique « d'origine » ou native, soit directement, soit par l'intermédiaire de partenaires, de canaux et de filiales, selon ce qui convient à cette zone géographique et à ce marché.